



Your Strategy, Your Way.

Global Strategy Summit

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MR. MOHAMMED SHAIK

Design Thinking for Strategy Formulation: Beyond Traditional Analysis

We hope you enjoy the presentation.

For any inquiries, please feel free to contact the CEO, Mr. Shaik Abdul Khadar, at +91 77997 9833, fruiStrategy Pvt. Ltd.

Design Thinking for Strategy Formulation Beyond Traditional Analysis

Mohammed Shaik

Director, AI Adoption and Change Management,
Futurists Hub, Dubai UAE

shaikms@gmail.com

[LinkedIn](#)

Blueprint

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- The Strategy Trap
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Introduction

I am a

- Product & Technology Leader
- Digital Transformation Executive
- AI Adoption Architect
- AI Change Management Leader
- Strategist
- Entrepreneur

⚠️ Disclaimer Before We Begin

This isn't a critique of any framework, process, or methodology you use today.

I'm not here to point fingers only to open minds.

My intention is simple:

To explore how we can modernize, evolve, and enhance the way we formulate strategy regardless of what approach you're using now.

That's it.

No judgment, just possibility.

Core Narrative Arc

The Strategic Illusion: Why Analysis Fails to Guide Bold Strategy

“Most strategic planning is just budget allocation with a spreadsheet. But real strategy is about making tough, imaginative choices in the face of ambiguity.” – *Roger Martin*

- Analysis is retrospective; it optimizes the known.
- It assumes data = insight, but strategy lives in the unknown.
- Strategy becomes risk-averse and status-quo affirming.

Provocation: What if analysis is actually the enemy of true strategy?

The Mindset Shift: From Certainty to Curiosity

“Good product thinkers constantly discover what works. They don’t assume they know. They test and learn.” – *Teresa Torres*

- Design thinking encourages iterative learning.
- Instead of “What’s the answer?” ask “What’s worth exploring?”
- Strategic confidence should emerge *through* discovery, not before it.

Core Message: Strategy must be shaped by exploring desirability, feasibility, and viability, not only by calculating ROI.

The Forecast That Failed

“January. A global supply chain company wraps up its annual strategy offsite.

Spreadsheets glow. KPIs are locked. Forecasts show 96% fulfillment precision.

Everyone nods. The board signs off. Confidence is high.

April. A Tier 2 supplier floods. Three weeks offline.

Small disruption? They think so.

May. Backlogs pile. Inventory misaligns. SLAs slip. Revenue tanks.

In the war room, the CEO asks the SVP of Strategy:
“Why didn’t we see this coming?”

The Forecast That Failed

And the uncomfortable truth is:

**They had all the data.
They just didn't ask the right questions.**

They optimized the past — not designed for the unknown.

Later, that leader said:

“We were precise... but blind. Strategy wasn’t wrong. It was incomplete.”

The Forecast That Failed

This isn't just one company. It's a pattern.
Strategy today is brilliant at measuring, but
poor at imagining.

Which leads us to the real question:

**What if the real problem isn't lack of
analysis but the absence of design?**

The Strategy Trap



“In most boardrooms, strategy means analysis.

We gather data. Build dashboards. Craft forecasts.

We turn the future into a spreadsheet.

And if the numbers are clean, we feel safe.



But here's the trap:

Data only tells us what's already happened.

And yet, we use it to design what hasn't.



Strategy becomes a budgeting exercise in disguise.

Scorecards become comfort blankets.

And strategic plans? Beautifully flawed guesses.



We reward certainty and punish doubt.

But real strategy starts where the data ends.

Common Patterns of the Trap

Overconfidence in the Known

“If we can measure it, we can manage it.”

- But in complex systems, *what matters most can't always be measured.*

Blind Spots in Assumptions

“Our model worked last year.”

- Until one assumption quietly fails.. and everything unravels.

Slow, Defensive Planning Cycles

“Let's revisit this next quarter.”

- By then, the market has already moved.

Strategy as a Design Challenge



“What if the real power of strategy isn’t in precision – but in **possibility**?



What if instead of asking '*What's most likely to happen?*', we asked: '*What's worth exploring?*'



That's where **Design Thinking** enters the picture.



It doesn't reject analysis – It completes it.”

The Strategy Reframe Lens



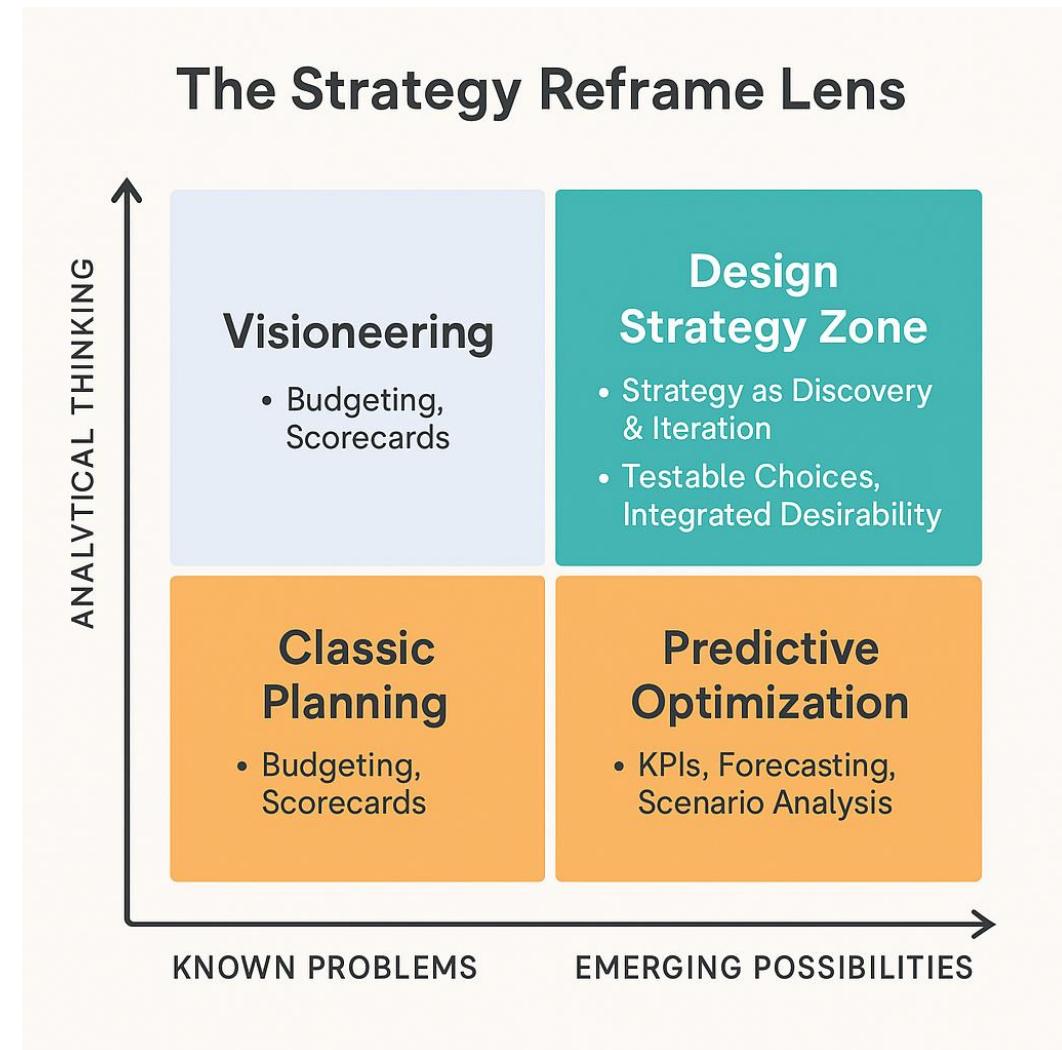
Signature Model :
“The Strategy Reframe Lens”

From Prediction to Design. A New Lens for Strategic Leadership

Walkthrough the Quadrants

◆ Quadrant I – Classic Planning *Budgeting, Scorecards, MBOs*

- Works in stable, linear systems
- Breaks under complexity

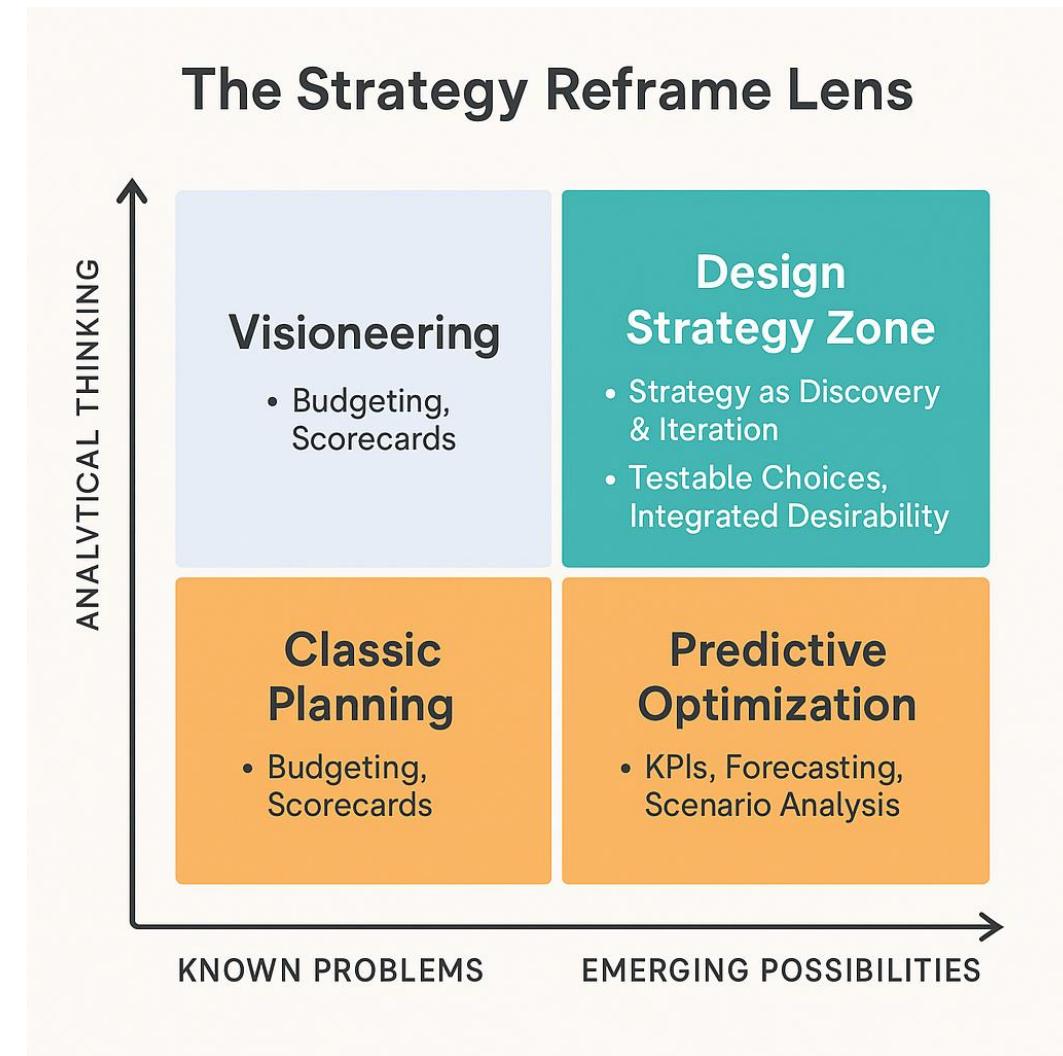


Walkthrough the Quadrants

◆ Quadrant II – Predictive Optimization

AI forecasts, scenario trees, risk models

- Useful for operational efficiency
- Assumes the future = past patterns

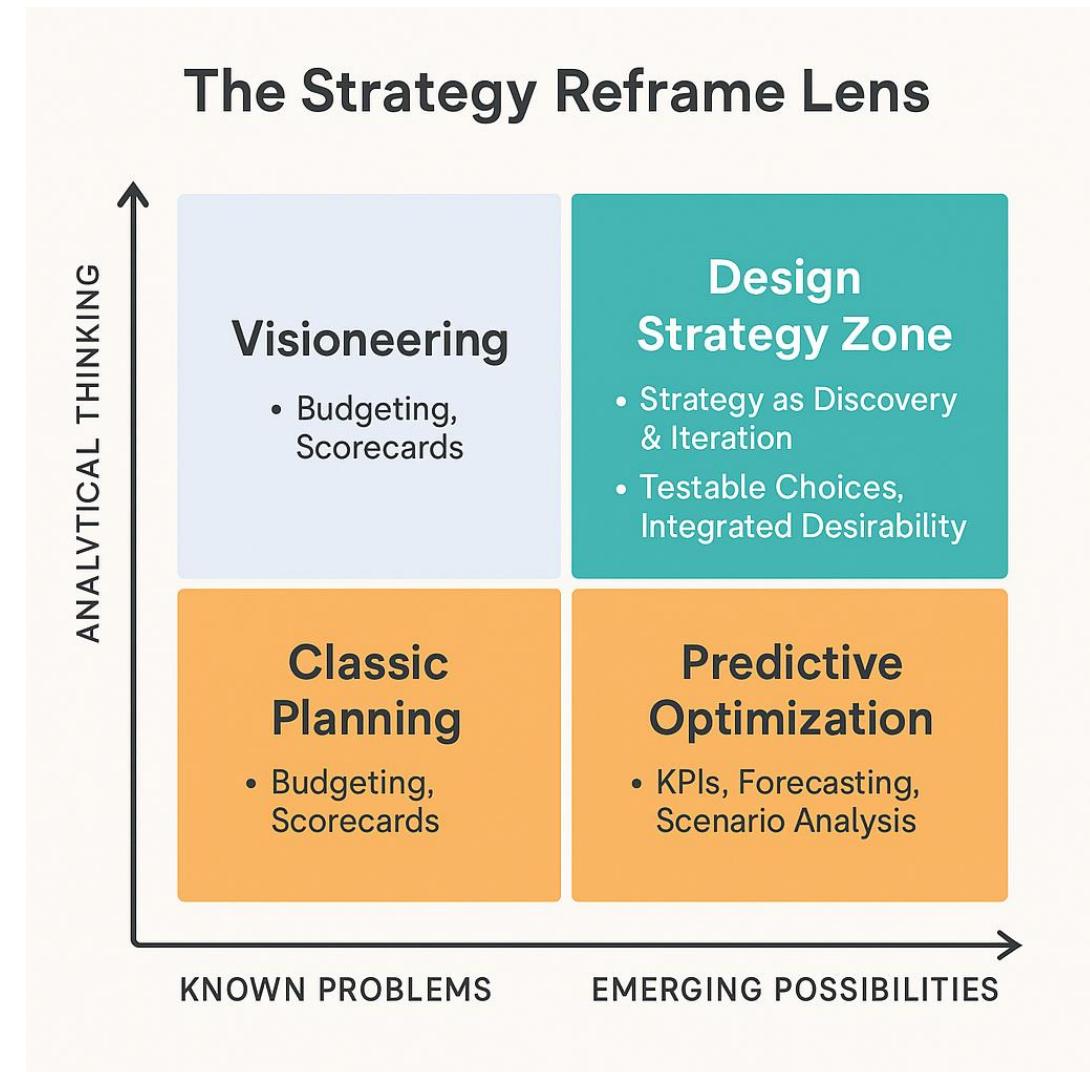


Walkthrough the Quadrants

◆ Quadrant III – Visioneering

Blue-sky thinking, innovation labs

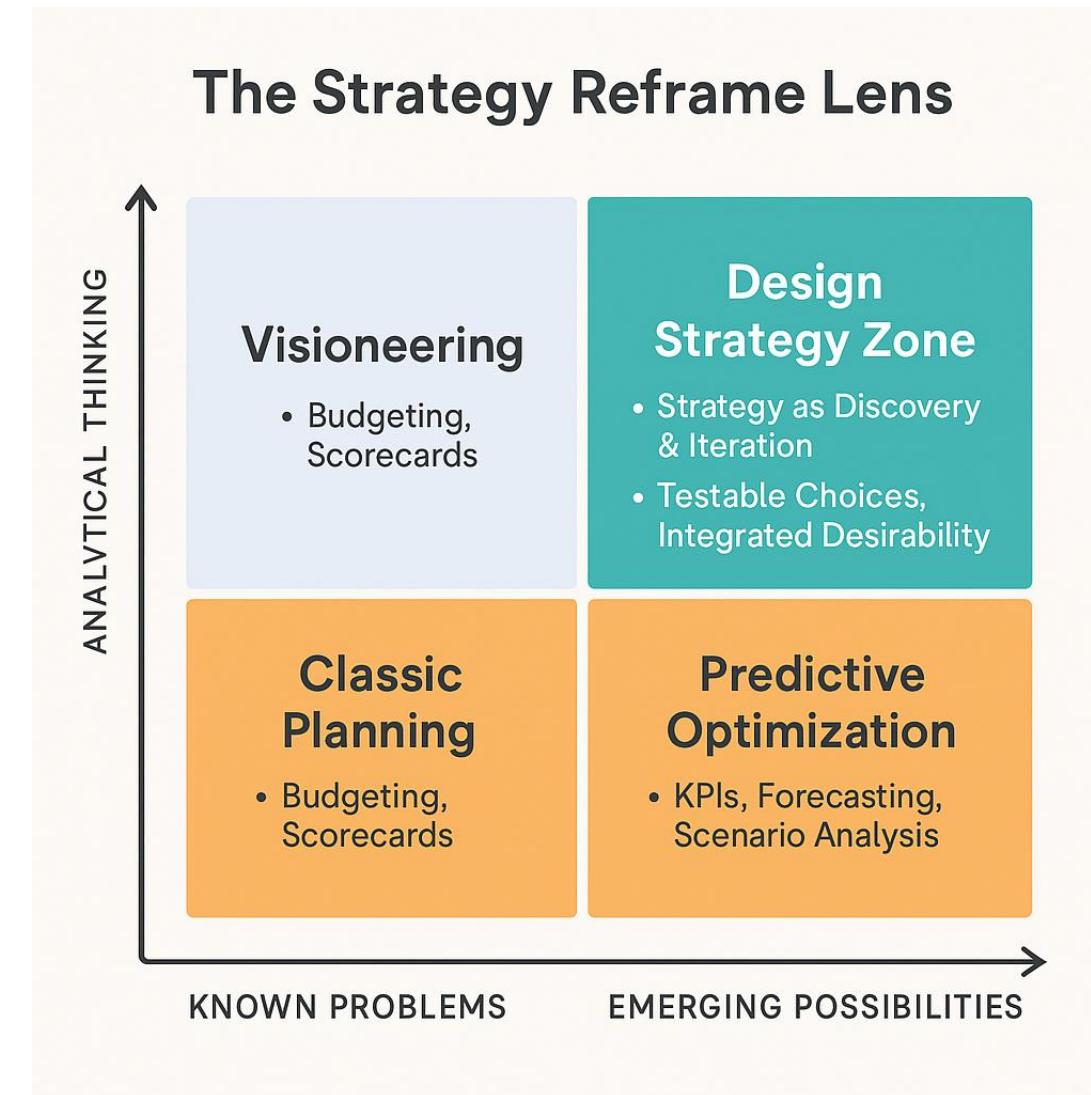
- Inspires bold futures
- Often detached from real-world constraints



Walkthrough the Quadrants

! Quadrant IV – Design Strategy Zone *Where Design Thinking meets Strategic Discipline*

- You explore what's desirable, feasible, and viable
- You test assumptions, not just set KPIs
- You make choices based on behaviour, not belief



What Design Thinking Unlocks

- **Theme:** Design Thinking isn't soft — it's strategic. It brings the muscles traditional strategy lacks.
- “Design Thinking isn't about sticky notes.
- It's about sharpening strategy in ways analysis can't.”
- Here's what it unlocks:



Empathy → Strategic Insight

- Data shows what people do. Empathy reveals why.
- Understand real behaviors, pain points, unmet needs
- Ground strategy in lived experiences — not just reports

Iteration → De-Risked Decision-Making

- “Great strategy isn’t guessed — it’s tested.”
- Prototype choices before betting the company
- Learn fast, adjust faster — before the market forces you

Integration → Better Strategic Choices

- Designers hold tension. Strategists resolve it.
- Embrace trade-offs (efficiency vs. resilience, growth vs. risk)
- Use creative tension to build better, not safer strategies

Strategic Reframe in Action

Theme: A real-world example showing how shifting from analysis to design thinking transformed strategic outcomes.

Let's bring this to life.

Here's a true story anonymized but you'll likely see your world in it.

Context:

A global logistics company – mature, efficient, deeply analytical.

Their scorecards were immaculate.

Yet for two years straight, they missed their on-time delivery targets in volatile markets – despite excellent planning.

☒ Old Strategy Approach:

Focused on optimizing historical shipping patterns

KPIs were tied to forecast accuracy and fulfillment rates

Root cause analyses blamed external disruptions

They kept improving the model – but the outcomes didn't improve.

The Strategic Reframe:

Instead of asking 'What's broken in the supply chain?', they asked:
'What's changing in the customer expectation?'

- 🔍 They ran design interviews with warehouse managers, clients, and drivers
- 💡 They prototyped flexible routing options with live feedback
- 🔄 They iterated based on behavior — not assumptions

New Strategy Outcomes:

Introduced a **dynamic delivery commitment model**

Shifted from “on-time” to “on-demand with transparency”

Built real-time feedback loops into planning cycles

☒ Result:

21% improvement in customer satisfaction

17% reduction in fulfillment stress cost

Strategy became *adaptive*, not reactive

Designing the Future

Theme: True strategic leadership is not about knowing the answers, it's about designing better ~~strategies and challenges~~ seen as a test of intellect the one with the sharpest model wins.

But in today's world, resilience is not found in models.

It's found in mindsets.

● Traditional Strategy Asks:

“What’s the optimal plan?”

But assumes the world is stable enough to
~~execute it.~~

⌚ Design-Led Strategy Asks:

“What’s worth testing? What’s worth
~~learning?~~

And what bold choice can we make, even when
we’re unsure?”

Closing Metaphor:



“Spreadsheets organize the past.



Design organizes the future.”



Leaders of the next decade won't just optimize KPIs –



They'll shape new playbooks.



Not with confidence in prediction...



But with courage in curiosity.

Call to Action:

So, here's your challenge:

Find one assumption in your strategy today that everyone takes for granted. And test it. Explore it. Reframe it.

Not because it's wrong but because it hasn't been designed yet.

The future won't reward those who knew the answer.

It will reward those who knew how to ask better questions . And were bold enough to design new ones.

Strategic Reframe Playbook

A Step-by-Step Guide to Move Beyond Traditional Analysis

Playbook Big Picture

Phase	Objective	Mindset Shift
1. Sense	Challenge the current strategy logic	From certainty → to curiosity
2. Frame	Reframe the strategic problem	From problems → to possibilities
3. Discover	Surface insights through real-world engagement	From assumptions → to evidence
4. Prototype	Design and test bold choices	From planning → to experimenting
5. Integrate	Scale what works, revise what doesn't	From annual reviews → to continuous strategy

Step 1: Sense the Limits of Your Current Strategy

Goal: Expose blind spots and fragility in your current strategic thinking

Instructions:

Review last year's strategic plan

Highlight assumptions that *didn't hold up*

Ask: *What surprised us? What did we not see coming?*

Invite cross-functional critiques (especially from frontline teams)

Tool: "Failure Reflection Canvas"

Mindset Shift: Strategy begins where confidence ends

shaikms@gmail.com

<https://www.linkedin.com/in/shaikmohammed/>

Step 2: Reframe the Strategic Challenge

Goal: Turn narrow goals into design-worthy challenges

Instructions:

Replace “How do we hit 95% on-time delivery?” with

- “How might we design a delivery model that thrives in disruption?”

Surface **tensions** (e.g., speed vs. resilience, scale vs. quality)

Use “How Might We” framing to open up strategic space

Tool: Reframing Ladder (zoom out → zoom in)

Mindset Shift: Strategy is about *possibility space*, not problem solving

Step 3: Discover Real-World Insights

Goal: Replace internal assumptions with external truths

Instructions:

Conduct discovery interviews with customers, partners, frontline ops

Use observation over opinion: *What do people do, not say?*

Map behaviors, pain points, workarounds, and unmet needs

Tool: Strategic Empathy Map

Mindset Shift: Great strategy listens more than it plans

Step 4 : Prototype Bold Strategic Choices

Goal: Design testable, high-leverage strategic options

Instructions:

Translate insights into strategic prototypes:

- New business models, value propositions, or operating rhythms

Pilot the riskiest assumptions at small scale

Measure not just success but *learning velocity*

Tool: Strategy Prototype Canvas

Mindset Shift: Treat strategy like product prototype it

Step 5: Integrate & Iterate Continuous ly

Goal: Move from one-time strategy to a living system

Instructions:

Embed weekly/bi-weekly learning loops into strategy discussions

Evolve scorecards to include **leading indicators of learning**

Institutionalize feedback across org levels

Tool: Strategic Learning Loop

Mindset Shift: Strategy is not a moment. It's a motion.

Example: PayPal Expanding into Emerging Markets

Strategic Challenge:

“How should PayPal expand sustainable payment adoption in underserved, cash-heavy economies?”

Step 1: Define the Strategic Choice (Roger Martin Style)

Roger Martin says:

Strategy is not planning it's making **integrated, mutually reinforcing choices.**

Let's apply that:

1.What is our winning aspiration?

→ Make PayPal the default digital wallet in emerging markets.

2.Where will we play?

→ Focus on tier-2/3 cities in India, Philippines, and Kenya.

3. How will we win?

→ Outcompete cash by making PayPal more **intuitive, trustable, and context-relevant** than local alternatives.

4. What capabilities must be in place?

→ Localized UX, offline-to-online transaction flow, merchant incentives, KYC simplicity.

5. What management systems are required?

→ Feedback loops from users and micro-merchants, lean policy enablement, agile product delivery teams.

Step 2: Apply Design Thinking to Discover & Validate

Design Thinking pushes us to **learn from the ground up**, not just from HQ dashboards.

Empathize

- Teams conduct field research in rural India and Manila slums.
- They observe: People don't trust QR codes. Many phones are shared among family. Merchants avoid digital payments due to settlement delays.

Define

Reframe the strategic challenge:

“How might we make PayPal feel as trustworthy and tangible as cash — without requiring tech literacy?”

💡 Ideate

Cross-functional teams brainstorm:

- A “Digital Stamp Card” metaphor using WhatsApp UI
- PayPal Lite → Works on 2G, no app installation
- Trusted Agent Program: Local shopkeepers double as KYC/Onboarding assistants

▣ Prototype & Test

- Launch PayPal Lite MVP in 3 localities in Tamil Nadu
- A/B test onboarding via QR vs. Trusted Agent
- Observe real behavior, not just reported preference

- **Step 3: Integrate Back into Strategy Loop (Roger Martin Again)**

- After discovery and testing:
- **Where to Play** now shifts to communities with strong shopkeeper networks
- **How to Win** evolves into a trust-by-proxy model: low-tech UX + local human trust
- New capabilities identified: Local agent training, micro-incentives, real-time fraud alerts in regional languages
- Management systems updated: Weekly field feedback → **strategic inputs**, not just product feedback

* Final Impact

- This approach:
- Avoids launching a “globalized” UX in a market where it would fail
- Accelerates adoption through **context-sensitive innovation**
- Reinforces strategy through real-world behavior
- Connects *Design Thinking's human empathy* with *Strategy's bold choice-making*

Executive Takeaway

Strategy without empathy is blind.

- Design without direction is scattered.
- But when combined – they help us choose boldly and design wisely.

The End



Final Thoughts

Don't wait for the future to validate your plan
Design a strategy that discovers the future, one decision at a time.



Thank You



Q & A